IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF DELAWARE

REDACTED PUBLIC VERSION

TEVA PHARMACEUTICALS USA, INC., TEVA PHARMACEUTICAL INDUSTRIES LTD., and NOVOPHARM, LTD., Counterclaim Plaintiffs, v. ABBOTT LABORATORIES, FOURNIER INDUSTRIE ET SANTÉ, and LABORATOIRES FOURNIER S.A., Counterclaim Defendants.	C.A. No. 02-1512 (SLR) CONSOLIDATED
IMPAX LABORATORIES, INC., Counterclaim Plaintiff, v. ABBOTT LABORATORIES, FOURNIER INDUSTRIE ET SANTÉ, and LABORATOIRES FOURNIER S.A., Counterclaim Defendants.	C.A. No. 03-120 (SLR) CONSOLIDATED
IN RE TRICOR DIRECT PURCHASER ANTITRUST LITIGATION THIS DOCUMENT RELATES TO: ALL ACTIONS	C.A. No. 05-340 (SLR) CONSOLIDATED
IN RE TRICOR INDIRECT PURCHASER ANTITRUST LITIGATION THIS DOCUMENT RELATES TO: ALL ACTIONS	C.A. No. 05-360 (SLR) CONSOLIDATED

DEFENDANTS' JOINT APPENDIX
<u>IN SUPPORT OF SUMMARY JUDGMENT MOTIONS</u>

VOLUME III OF III

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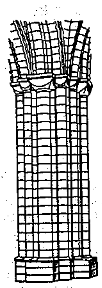
cluster cup *n* : AECIUM

cluster-cup stage \'==,=-\ *n* : the aecial stage of a rust fungus

clustered *adj* [ME, fr. ¹*cluster* + *-ed*] **1** : formed or located in clusters — compare SOLITARY 5a **2** : composed or apparently composed of several similar elements clustered together ⟨a ~ pier⟩ ⟨a ~ column⟩



clustered pier

clustered bluet *n* : a weed (*Oldenlandia uniflora*) having buttonlike clusters of tiny flowers

clustered poppy mallow *n* : a perennial herb (*Callirhoë triangulata*) of the prairie regions of the U.S. with purple flowers in panicled clusters

cluster fig *n* : an East Indian fig (*Ficus glomerata*) often planted as a shade tree having tapering leaves, small clusters of red fruit, and astringent bark — called also *country fig*

cluster flower *n* : a plant of the genus *Cestrum*

cluster fly *n* : a large dark-brown fly (*Pollenia rudis*) related to the bluebottles and often gathering in large clusters in attics and other sheltered places during cool autumn weather

cluster gear *n* : a set of gears of different sizes mounted as a unit on the same shaft — called also *gear cluster*

clus·ter·ing·ly *adv* : in a clustering manner

cluster pepper *n* **1** : a hot pepper (*Capsicum frutescens fasciculatum*) with slender elongated bright red and extremely pungent fruits borne erect in clusters **2** : the fruit of a cluster pepper

cluster piles *n pl* : piles driven in a close bundle and usu. lashed together with chains or steel bands

cluster pine *also* **cluster fir** *n* [so called fr. its cones] : a pyramidal pine (*Pinus pinaster*) of the Mediterranean region with reflexed bud scales and needles in pairs

clusters *pl of* CLUSTER, *pres 3d sing of* CLUSTER

cluster variable *n* : a short-period variable star of Cepheid characteristics and a period of light fluctuations not longer than a day orig. found in globular clusters but abundant elsewhere in the Milky Way galaxy — called also *cluster-type Cepheid*

cluster wheat *n* : CLUB WHEAT

¹**clutch** \'klǝch\ *vb* -ED/-ING/-ES [ME *clucchen*, fr. OE *clyccan*; akin to OFris *kletsie* spear, Sw *klyka* fork, crotch, MHG *klok* spot, ON *klakkr* lump, MIr *glacc* hand — more at CLING] *vt* **1 a** : to seize, grip, or hold with the hand or claws usu. strongly, tightly, or suddenly ⟨sleeps . . . with his musket . . . ~*ed* tightly —S.V.Benét⟩ ⟨~*ed* his arm fiercely⟩ **b** : to hold or try to retain control or possession of : SEIZE ⟨~ power⟩ **2** *obs* : to close tightly : CLENCH ⟨~*ing* hands⟩ ~ *vi* **1** : to seek to hold or retain possession ⟨~*ed* at her son's devotion—Andrea Parke⟩ : take immediate advantage or make immediate use (as of an idea or an opportunity) — often used with *at* ⟨~ at remedies that her calmer self would have put by —H.O.Taylor⟩ **2** : GRASP, HOLD ⟨roots that ~ deeply into the earth⟩ **3** : to operate a clutch (sense 3) **syn** see TAKE

²**clutch** \"\ *adj* **1** *of a woman's coat* : lacking fasteners and suitable for holding closed with the hand or arm **2** *of a woman's handbag* : lacking handles and of a size and shape suitable for clasping in the hand

³**clutch** \"\ *n* -ES [ME *cloche*, *clowche*, alter. (influenced by ME *clucchen* to clutch) of *cloke*, *cluke*; akin to OE *clyccan* to clutch] **1 a** : the claws or a hand in the act of grasping or seizing firmly ⟨a rabbit in the ~ of a hawk⟩ **b** : control, power, or possession esp. of a rapacious or cruel person or an unrelenting force ⟨in the dry, womanless ~ of the army —Irwin Shaw⟩ ⟨the fell ~ of circumstance —W.E.Henley⟩ — often used in pl. ⟨in the ~*es* of a desperate infatuation —Delmore Schwartz⟩ **c** : the act of grasping, holding, or restraining : GRASP, GRIP ⟨the gravitational ~ of the earth —*N.Y. Times*⟩ **2** : a device for gripping an object, as at the end of a chain or tackle **3 a** : a coupling used to connect and disconnect a driving and a driven part of a mechanism esp. one that permits the former part to engage the latter gradually and without shock — see BAND CLUTCH, CENTRIFUGAL CLUTCH, CONE CLUTCH, DISK CLUTCH, FRICTION CLUTCH, MAGNETIC CLUTCH, MAGNETIC FLUID CLUTCH **b** : a lever operating such a clutch **4** : a tight or critical situation (as when the outcome of a game is at stake) : PINCH ⟨a batter able to come through with a hit in the ~⟩ ⟨a good ~ hitter⟩

⁴**clutch** \"\ *n* -ES [alter. of *cletch*] **1 a** : a nest of eggs or a brood of chicks **b** : a group of offspring produced at a birth **2** : the eggs laid by a bird at regular consecutive intervals without intervening longer pauses **3** : GROUP, BUNCH ⟨a whole ~ of people trooped in together —Mollie Panter-Downes⟩

clutch·man \'=mǝn, -,man\ *n, pl* **clutchmen** [³*clutch* + *man*] : one who operates a clutch; *specif* : one operating a clutch on a beet-slicing machine — called also *cutterman*

cluth·er \'klǔthǝ(r), -ǝth-\ *n* -S [var. of ²*clutter*] *dial Brit* : a large quantity : CLUSTER, BUNCH

¹**clut·ter** \'klǝd·ǝ(r), -ǝtǝ-\ *vb* -ED/-ING/-S [alter. of earlier *clotter*, fr. ME *clotteren* to clot, fr. *clot* + *-eren* (freq. suffix) — more at CLOT] *vt* **1** *dial* : to crowd together in disorder **2** : to fill or cover with things in disorder or scattered at random or with things that impede movement or action or reduce effectiveness ⟨a ~*ed* room⟩ ⟨an author . . . may ~ his explanations with digressive evidence that delays the reader —G.W.Sherburn⟩ — often used with *up* ⟨the roads of France ~*ed* up with refugees —Henri Peyre⟩ ~ *vi* **1** *now chiefly dial* **a** : to run together in knots or confused crowds : run in disorder **b** : to make a confused noise : BUSTLE **2** *archaic* : to speak confusedly or inarticulately : jumble words

²**clutter** \"\ *n* -S **1 a** : a crowded or confused mass or collection ⟨a ~ of shops and tenements⟩ : a mass of disorderly or distracting objects or details ⟨pure and noble design, unspoiled by ~ or ornament —E.K.Brown⟩ ⟨steaming . . . seaward among a ~ of sister ships—K.M.Dodson⟩ **b** : LITTER, DISORDER ⟨photographs . . . propped up amid a ~ of china ornaments —Hamilton Basso⟩ ⟨pushing aside the ~ on the table —Harriet LaBarre⟩ **c** : the visual indication on a radar screen of interference or echo from objects other than the target tending to obscure target indication — compare SEA RETURN **2** *now dial* : turmoil or confusion of movement or activity : DISTURBANCE, HUBBUB : confused noise ⟨ladies who were apt to make the greatest ~ upon such occasions—Jonathan Swift⟩ **syn** see CONFUSION

clut·ter·er \-ǝrǝ(r)\ *n* -S : one whose speech is defective by reason of cluttering

cluttering *n* -S : a speech defect in which phonetic units are dropped, condensed, or otherwise distorted as a result of overly rapid agitated utterance

¹**cly** \'klī\ *vt* [perh. fr. LG *kleien* to scratch, fr. MLG; akin to Flem *klauwen* to scratch, steal, G *klauen*, OHG *klāwa* claw — more at CLAW] *slang* : SEIZE, STEAL

²**cly** \"\ *n* -ES [perh. fr. ¹*cly*] *slang* : POCKET, PURSE

clydes·dale \'klīdz,dāl\ *n* -S *usu cap* [fr. *Clydesdale*, valley in Scotland where it originated] : a heavy draft horse of a breed orig. from Clydesdale, Scotland, distinguished by a dark brown or black coat, white blaze and stockings, and heavy feathering about the fetlock

clydesdale terrier *n, usu cap C* [fr. *Clydesdale*, valley in Scotland where it originated] : a small terrier of a breed resulting from selective breeding of the Skye terrier and distinguished by tiny erect ears, a long and silky coat, and short legs

clyde·side \'klīd,sīd\ *adj, usu cap* [*Clyde*, river in Scotland + E *side*] : of or relating to the region along the Clyde in Scotland; *esp* : having to do with shipbuilding, the chief industry of this region

clyde·sider \-dǝ(r)\ *n* -S *cap* : a native or resident of the region along the Clyde in Scotland

cly·er \'klī(ǝ)r\ *n* -S [D *klier* gland, scrofula, fr. MD *cliere*; akin to Fris *klir* gland] **1** : a tuberculous lymph gland in cattle **2 clyers** *pl* : tuberculosis of the bovine lymphatic system

cly·me·nel·la \,klimǝ'nelǝ, ,klim-\ *n, cap* [NL, fr. *Clymene*, an Oceanid (fr. L, fr. Gk *Klymenē*) + NL *-ella*] : a genus of polychaete worms common in shallow waters of the northern Atlantic coasts — see BAMBOO WORM

¹**clym·e·nid** \'klimǝnǝd, -,nid\ *adj* [NL *Clymenidae*] : of or relating to the Clymenidae

²**clymenid** \"\ *n* -S : a clymenid ammonoid

cly·men·i·dae \klī'menǝ,dē, klǝ'-\ *n pl, cap* [NL, fr. *Clymenia*, type genus (fr. *Clymene* + NL *-ia*) + *-idae*] : a family of extinct Devonian ammonoids having the siphuncle at the dorsal margin of the whorls

clype \'klīp\ *vi* -ED/-ING/-S [alter. of earlier *cleip*, fr. ME *clepien* to call — more at CLEPE] *Scot* : to tell secrets : TATTLE

clyp·e·al \'klipēǝl\ *adj* [NL *clypeus* + E *-al*] : of or relating to a clypeus

clyp·e·as·ter \,klipē'astǝ(r)\ *n, cap* [NL, fr. L *clypeus* round shield + NL *-aster*] : a widely distributed genus (the type of the family Clypeastridae) of large burrowing cake urchins

clyp·e·as·trid·ea \,=pēǝ'strīdēǝ\ [NL, fr. *Clypeastr-*, *Clypeaster* + *-idea*] *syn of* CLYPEASTRINA

clyp·e·as·tri·na \-ǝ'strīnǝ, -rēnǝ\ *n pl, cap* [NL, fr. *Clypeaster* + *-ina*] : a suborder of sea urchins (order Exocycloida) comprising a large number of flattened more or less discoidal sea urchins (as the cake urchins and sand dollars) — compare SPATANGINA

¹**clyp·e·as·troid** \'==,a,strōid\ *adj* [NL *Clypeastroida*] : of or relating to the Clypeastrina

²**clypeastroid** \"\ *n* -S : one of the Clypeastrina : CAKE URCHIN

clyp·e·as·troi·da \,==ǝ'strōidǝ\ *or* **clyp·e·as·troi·dea** \-dēǝ\ [NL *Clypeastroida*, alter. of *Clypeastroidea*, fr. *Clypeaster* + *-oidea*] *syn of* CLYPEASTRINA

clyp·e·ate \'klipēǝt, -ē,āt, *usu* -d· + V\ *or* **clyp·e·at·ed** \-,ād·ǝd\ *or* **clyp·e·i·form** \-pēǝ,fȯrm\ *adj* [*clypeate* fr. L *clypeus* round shield + E *-ate*; *clypeated* fr. L *clypeus* + E *-ate* + *-ed*; *clypeiform* fr. L *clypeus* + E *-iform*] **1** *biol* : shaped like a round buckler or shield : SCUTATE **2** *biol* : furnished with a clypeus or with a shieldlike plate or process

clyp·e·ole \-,ōl\ *also* **clyp·e·o·la** \klǝ'pēǝlǝ\ *n, pl* **clypeoles** \-lz\ *or* **clypeo·lae** \-ǝ,lē\ [NL *clypeola*, fr. L *clypeus* round shield + *-ola* -ole] : one of the shield-shaped sporophylls composing the fertile spike in members of the genus *Equisetum*

clyp·e·us \'klipēǝs\ *n, pl* **clyp·ei** \-ē,ī\ [NL, fr. L *clipeus*, *clupeus*, *clypeus* round shield] **1** : a plate or shield on the anterior median aspect of an insect's head that commonly consists of two fused sclerites and bears the labrum on its anterior margin **2** *bot* : a black disklike tissue formed about the mouth of the perithecia in certain ascomycetes **3** : the area on the front of a spider's head bounded by the eyes and the first pair of appendages

cly·sis \'klīsǝs\ *n, pl* **cly·ses** \-,sēz\ [NL, fr. Gk *klysis*, fr. *klyzein* to wash] : the introduction of large amounts of fluid into the body usu. by parenteral injection to replace that lost (as from hemorrhage or in dysentery or burns), to provide nutrients, or to maintain blood pressure — see HYPODERMOCLYSIS, PHLEBOCLYSIS, PROCTOCLYSIS

clys·ma \'klizmǝ\ *n, pl* **clysma·ta** \-mǝd·ǝ\ [NL, fr. Gk *klysma*, fr. *klyzein*] : ENEMA

clys·sus \'klisǝs\ *n, pl* **clys·si** \-,sī\ [NL] : a quintessence or efficacious principle

clys·ter \'klistǝ(r)\ *n* -S [ME, fr. MF or L; MF *clistere*, fr. L *clyster*, fr. Gk *klystēr*, fr. *klyzein* to wash out; akin to OE *hlūtor* clean, pure, OHG *hlūtar*, ON *hlēr* sea, Goth *hlutrs* pure, clean, L *cluere* to purge, W *clir* clear, clean, Lith *šluoti* to sweep] : ENEMA

clyte \'klīt\ *var of* CLOIT

cm *abbr* **1** centimeter **2** cumulative

CM *abbr* **1** *often not cap* [L *causa mortis*] by reason of death **2** center matched **3** certificated master; certificated mistress **4** circular measure **5** *often not cap* circular mil **6** common meter **7** corresponding member **8** countermark; countermarked **9** court-martial

Cm *symbol* curium

c major *n, usu cap C* : the major musical key having neither sharps nor flats in its signature

cmd *abbr* command

CMD *abbr* common meter double

cmdg *abbr* commanding

cmdr *abbr* commander

cmdre *abbr* commodore

c melody *n, usu cap C* : a tenor saxophone in C instead of the usual B flat

c minor *n, usu cap C* : the minor musical key having a signature of three flats

c-mitosis \'sē+\ *n* [colchicine + *mitosis*] : an artificially induced abortive nuclear division in which the chromosome number is doubled (as that caused by exposure of cells to colchicine)

c-mitotic \"+\ *adj* : of, like, or inducing c-mitosis

cml *abbr* commercial

cn *abbr* **1** canon **2** consolidated

CN *abbr* **1** case of need **2** circular note **3** compass north **4** consignment note **5** cover note **6** credit note

-cne·mia \(k)'nēmēǝ\ *n comb form* -S [NL, fr. F *-cnémie*, fr. Gk *knēmē* shin + F *-ie* -y] : -shinnedness ⟨platycnemia⟩

cne·mi·al \'nēmēǝl\ *adj* [Gk *knēmē* shin + E *-ial*] : relating to the shin or shinbone

-cne·mic \(k)'nēmik\ *adj comb form* [ISV *-cnem-* (fr. Gk *knēmē* shin) + *-ic*; prob. orig. formed as F *-cnémique*] : -shinned ⟨platycnemic⟩

cne·mi·do·cop·tes \,nēmǝ(,)dō'käp,tēz\ [NL, alter. of *knemidokoptes*, fr. Gk *knēmid-*, *knēmis* greave (fr. *knēmē* shin) + MGk *koptēs* cutter, fr. Gk *koptein* to cut — more at CAPON] *syn of* KNEMIDOKOPTES

cne·mi·doph·o·rus \,nēmǝ'däfǝrǝs\ *n, cap* [NL, fr. Gk *knēmidophoros* wearing greaves, fr. *knēmid-*, *knēmis* greave + *-phoros* -phorous] : a genus of American lizards of the family Teiidae — see RACE RUNNER

cne·mis \'nēmǝs\ *n, pl* **cnem·i·des** \'nemǝ,dēz\ [NL, fr. Gk *knēmis* greave, fr. *knēmē* shin] : SHIN, TIBIA

-cne·mus \(k)'nēmǝs\ *n comb form* [NL, modif. of Gk *knēmē* shin] : -legged one — in generic names of animals ⟨Octacnemus⟩

cne·o·rum \nē'ōrǝm, -ȯr-\ *n, cap* [NL, fr. Gk *kneōron*, a plant, prob. spurge flax (*Daphne gnidium*); prob. akin to Goth *hnasqus* soft, Skt *kiknasa* grits, and L *cinis* ashes — more at INCINERATE] : a small genus (constituting a family Cneoraceae of the order Geraniales) of low evergreen shrubs of the Mediterranean region having oblong or spatulate coriaceous leaves and small axillary cymose or solitary flowers

cni·cus \'nīkǝs\ *n, cap* [NL, fr. L *cnicus*, *cnecus* safflower, fr. Gk *knēkos* safflower, thistle, yellow — more at HONEY] : a genus of European herbs of the family Compositae — see BLESSED THISTLE

cnid- *or* **cnido-** *comb form* [NL, fr. *cnida*] : cnida ⟨cnidosac⟩ ⟨cnidoglandular⟩ ⟨Cnidaria⟩

cni·da \'nīdǝ\ *n, pl* **cni·dae** \-(,)dē\ [NL, fr. Gk *knidē* nettle, sea nettle; akin to L *nidor* smell of roasting meat — more at NIDOR] : NEMATOCYST

cni·dar·ia \nī'da(a)rēǝ\ [NL, fr. *cnid-* + *-aria*] *syn of* COELENTERATA — used esp. to distinguish the narrow from the more inclusive scope of Coelenterata

¹**cni·dar·i·an** \(')=;=rēǝn\ *adj* [NL *Cnidaria* + E *-an*] : of or relating to a cnida or the Cnidaria

²**cnidarian** \"\ *n* -S : one of the Cnidaria

cni·do·blast \'nīdǝ,blast\ *n* -S [ISV *cnid-* + *-blast*; orig. formed in G] : a cell that develops a nematocyst or develops into a nematocyst

cni·do·cell \-,sel\ *n* -S [*cnid-* + *cell*] : NEMATOCYST

cni·do·cil \-,sil\ *n* -S [ISV *cnid-* + NL *cilium* hairlike process — more at CILIA] : a minute process of a nematocyst that when touched is believed to cause the projection of the stinging thread

cni·do·cyst \-,sist\ *n* -S [ISV *cnid-* + *-cyst*] : NEMATOCYST

cni·do·phore \-,fō(ǝ)r\ *n* -S [*cnid-* + *-phore*] : a structure bearing nematocysts — **cni·doph·o·rous** \(')nī'däfǝrǝs\ *adj*

cni·do·pod \-,päd\ *n* -S [*cnid-* + *-pod*] : the stalklike base of a nematocyst

cni·do·sco·lus \,=='skōlǝs\ *n, cap* [NL, fr. *cnido-* (fr. Gk *knidē* nettle) + Gk *skōlos* thorn, pointed stake; akin to Gk *skallein* to hoe — more at CNIDA, SHELL] : a genus of stinging perennial herbaceous or shrubby plants (family Euphorbiaceae) characterized by alternate mostly long-petioled palmately veined and often lobed or divided leaves and stipules armed with stinging bristles

cni·do·spo·rid·ia \-spǝ'ridēǝ\ *n pl, cap* [NL, fr. *cnid-* + *-sporidia*] : a subclass of Sporozoa comprising protozoans that have complex spores with polar capsules and coiled polar filaments and are single-host parasites of lower vertebrates and invertebrates — see ACTINOMYXIDIA, MICROSPORIDIA, MYXOSPORIDIA — **cni·do·spo·rid·i·an** \;===;ridēǝn\ *adj or n*

cnossian *usu cap, var of* KNOSSIAN

c-note \'sē + ,-\ *n* -S *usu cap C, slang* : a 100-dollar bill

cnr *abbr* corner

CNS *abbr* central nervous system

co- *prefix* [ME, fr. L, fr. *com-*; akin to OE *ge-*, perfective, associative, and collective prefix, OHG *gi-*, *ga-*, Goth *ga-*, OIr *com-*, *con-* with, together, Alb *kë-*, Gk *koinos* common] **1** : with : together : joint : jointly : shared : mutual : mutually ⟨coexist⟩ ⟨coinheritance⟩ ⟨cosustain⟩ ⟨cooperate⟩ **2** : in or to the same degree ⟨coextensive⟩ ⟨coeval⟩ **3 a** : fellow : partner ⟨coauthor⟩ ⟨co-worker⟩ **b** : having a usu. lesser share in duty or responsibility : alternate : deputy ⟨cochairman⟩ ⟨copilot⟩ **4 a** : operating together or reciprocally ⟨coterm⟩ **b** : of the complement of an angle ⟨cosine⟩ ⟨codeclination⟩

co *abbr* **1** colon **2** company **3** container **4** coral **5** county

CO \'sē'ō\ *abbr or n* -S **1** commanding officer **2** conscientious objector

CO *abbr* **1** *often not cap* care of — usu. separated by a virgule **2** carried over **3** cash order **4** certificate of origin **5** colonial office **6** commissioner for oaths **7** communications officer **8** cut out

Co *symbol* cobalt

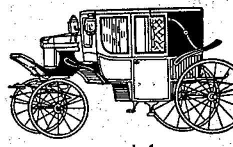
¹**co·ac·er·vate** \kō'asǝr,vāt, ,kōǝ'sǝr,-\ *vt* -ED/-ING/-S [L *coacervatus*] : to heap up : gather together in a heap or group : COLLECT; *esp* : to cause to form a coacervate

²**co·acer·vate** \,kōǝ'sǝrvǝt, (')kō;asǝr,vāt\ *adj* [L *coacervatus*, past part. of *coacervare* to heap up, fr. *co-* + *acervare* (fr. *acervus* heap); perh. akin to L *acus* chaff — more at EAR] **1** : piled up : collected into a crowd **2** : growing in dense clusters

³**coacervate** \"\ *n* -S : an aggregate of colloidal droplets (as of two hydrophilic sols or of a sol and ions of opposite charge) held together by electrostatic attractive forces

co·ac·er·va·tion \(,)kō,asǝ(r)'vāshǝn\ *n* -S : the process of becoming a coacervate : mutual precipitation : AGGREGATION ⟨~ of gelatin and gum arabic⟩

¹**coach** \'kōch\ *n* -ES *often attrib* [ME *coche*, fr. MF, fr. G *kutsche*, prob. fr. Hung *kocsi* (*szekér*) wagon from Kocs, fr. *Kocs*, village in Hungary] **1 a** : a large usu. closed 4-wheeled carriage having doors in the sides and generally a front and a back seat inside and an elevated seat in front for the driver **b** *Brit* : a railway passenger or mail car **c** : a railroad passenger car with reclining or nonreclining seats that is intended primarily for day travel **d** : BABY CARRIAGE **e** : a closed 2-door single-compartment automobile with permanent back panel and top and in front two separate seats which may be turned down and in the rear a full-width cross seat **f** : MOTOR COACH **g** : HOUSE TRAILER **h** : an automobile body esp. of a closed model **i** : a class of passenger air transportation at a lower fare than first class **2** : a cabin on the afterpart of the quarterdeck of a man-of-war usu. occupied by the captain **3 a** [so called fr. the tutor's being regarded as a means for conveying the student through his examinations] : a private tutor who assists students esp. in preparing for examination **b** : one who instructs or trains a performer or a team of performers (as in debating or in musical or dramatic performance); *specif* : one who instructs players in the fundamentals of a competitive sport and directs team strategy ⟨fencing ~⟩ ⟨football ~⟩ — compare MANAGER, TRAINER **c** : a manual with a condensed body of information on a subject to be committed to memory **d** : a member of a team at bat in baseball who is posted near first or third base to direct base runners and signal to batters **4** *Austral* : a decoy bullock used to catch wild cattle **5** : SPONSOR 4b



coach 1a

²**coach** \"\ *vb* -ED/-ING/-ES *vt* **1** *archaic* : to transport in, place in, or provide with a coach **2 a** : to train intensively by delineation, instruction, frequent demonstration, and repeated practice (as for an examination, a dramatic performance, or a public appearance) ⟨~ pupils⟩ ⟨there never was a witness so obviously ~*ed*⟩ **b** : to act as coach to (an athletic team or performer) **c** : to direct the movements of (a base runner) **d** : to give instructions, directions, or prompting to (one performing or attempting something) ⟨two escort vessels, the first maintaining sound contact . . . while it ~*ed* the second . . . by signals —J.P.Baxter b.1893⟩ ~ *vi* **1** : to go in a coach ⟨he ~*ed* to that licentious city —S.H.Adams⟩ **2 a** : to instruct as a coach : receive instruction from a coach **b** : to direct the movements of a base runner **syn** see TEACH

coach-and-four \;==;=\ *n* -S : a coach with four horses

coach box *n* : the driver's seat on a coach

coachbuilding \'=,==\ *n, Brit* : the design and manufacture of automobile bodies

coach dog *n* [so called fr. its formerly being used to run in attendance on a coach] : DALMATIAN

coach·ee \kō'chē *often and in sense 2 usu* '=(,)=\ *n* -S **1** : an American carriage shaped like a coach but longer and open in front **2** : COACHMAN

coach·er \'kōchǝ(r)\ *n* -S [In sense 1, fr. MF *cocher*, fr. *coche*; in sense 2, fr. ¹*coach* + *-er*; in sense 3, fr. ²*coach* + *-er*] **1** *obs* : COACHMAN **2** : COACH HORSE **3** : one that coaches; *specif* : COACH 3d

coach horn *n* : a long straight tapering copper horn with slight flare — compare POST HORN

coach horse *n* : a horse used or adapted for drawing a coach, being typically heavier and of more compact build than a road horse and exhibiting good style and action

coach house *n* : an outbuilding for a coach or carriage

coaching *n* -S **1 a** : traveling by coach **b** : pleasure driving in a coach (as in a tallyho) **2 a** : the profession or occupation of a coach **b** : instruction given esp. in private by or as if by a coach ⟨she learned reading under the ~ of her mother⟩

coaching house *n* : an inn serving coach travelers

coaching traffic *n* [¹*coach* (railroad car) + *-ing*] *Brit* : railroad passenger traffic

¹**coach·man** \'=mǝn\ *n, pl* **coachmen** [¹*coach* + *man*] **1** : a man whose business is to drive a coach or carriage **2** *angling* : an artificial fly with white wings, peacock herl body, brown hackle, and gold tag

²**coachman** \"\ *adj, of women's clothing* : imitative of the double-breasted coat with fitted waist and wide lapels formerly worn by coachmen

coach roof *n, chiefly Brit* : the roof of the cabin on a small boat

coach screw *n* : LAG SCREW

coachwhip \'=,=\ *n* **1** : a whip usu. provided with a long lash and used in driving a coach **2** : OCOTILLO 1 **3** : COACHWHIP SNAKE **4** : LONG PENNANT

coachwhip bird *n* : a babblerlike Australian passerine bird of the genus *Psophodes*; *esp* : a bird (*P. olivaceus*) having a note resembling the crack of a whip

coachwhip snake *n* : a long slender active colubrid snake (*Coluber*, syn. *Masticophis*, *flagellum*) of the southern U.S. of which the scale pattern resembles a braided whip

coachwood \'=,=\ *n* [so called fr. its use in coachbuilding] **1** : either of two Australian trees of the family Cunoniaceae: **a** : a medium-sized tree (*Ceratopetalum apetalum*) with grayish bark and dry hard fruits surrounded by winglike calyx lobes — called also *leatherjacket* **b** : a medium-sized to large tree (*Schizomeria ovata*) with a succulent egg-shaped fruit — called also *white cherry* **2** : the heavy tough fine-grained wood of the coachwood (sense 1a) pinkish in color but darkening on exposure and used chiefly for veneers and in cabinetwork — called also *scented satinwood*

coachwork \'=,=\ *n* : the design, building, and finishing of automobile bodies

¹**coachy** \'kōchē, -chi\ *n* -ES [alter. of *coachee*] : COACHMAN

²**coachy** \"\ *adj* [¹*coach* (*horse*) + *-y*] : like a coach horse esp. in configuration

¹**co·act** \kō'akt\ *vt* -ED/-ING/-S [ME *coacten*, fr. L *coactus*, past part. of *cogere* to compel — more at COGENT] : FORCE, COMPEL, DRIVE, CONTROL

Business Watch
Katherine Friedman; Katrina Kulp; Mary Berryann
Medical Marketing and Media; May 2000; 35, 5; Research Library
pg. 40

IMS HEALTH

Business Watch

1999 IN REVIEW

The industry hits new heights at the close of the Millennium

by Katherine Friedman, Katrina Kulp, and Mary Berryann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1999 AT A GLANCE

- The industry recorded a fourth consecutive year of double-digit growth with sales up 19 percent.
- Sales topped $125 billion, double 1995's $64 billion, with growth spurred primarily by higher drug utilization.
- Anti-ulcerants remained the sales leader, with cholesterol reducers taking over second spot from specific neurotransmitter modulators.
- Prilosec remained the sales leader, with Lipitor moving into second position.
- Searle's Celebrex was 1999's star new product, with the 12th highest sales volume in its launch year.

The U.S. pharmaceutical industry closed the millennium by soaring to new heights with an unprecedented 19-percent growth. By the end of 1999, the industry had capped the $125 billion[1] mark in its fourth straight year of double-digit growth, and had virtually doubled its 1995 total of $64 billion. Consumers filled a staggering 2.8 billion prescriptions[2], a nine-percent increase over 1998. The $20.3 billion expansion was driven primarily by higher drug utilization, and while new products did not impact the market as heavily as in 1998,

1 Represents purchases of prescription pharmaceutical products. Reflects price at trade-level, i.e., sale from wholesaler to chain warehouse, food store warehouse, independent drug store, mail order, non-federal hospitals, federal facilities, clinics, long-term care facilities and HMOs.

2 Reflects prescriptions dispensed through chain, independent and food store pharmacies, long-term care facilities and mail order channels.

there was one new star on the horizon — Searle's Celebrex — which augmented the company coffers by $1.4 billion.

Channels of Distribution

Sales

Retail pharmacy channels accounted for nearly 65 percent of U.S. pharmaceutical purchases, about the same as in 1998. Chain stores were responsible for $48 billion or 38 percent of the total; independents held a distant second place at $23 billion and food stores trailed with $10 billion. Approximately half of the institutional sales ($30.6 billion) were attributable to non-federal hospitals, followed by clinics and long-term care facilities (see Exhibit 1, right). Mail order pharmacy purchases accounted for $13 billion to garner a 10-percent share.

All retail outlets posted healthy purchase increases, with chains and food stores growing by more than 20 percent, while independents expanded by about 15 percent. Clinics and non-federal hospitals in the non-retail market increased sales by approximate $2 billion; sales to clinics have grown by 26.5 percent compared to non-federal hospitals, which increased by 16 percent. Meanwhile, mail order also increased by $2 billion for 23-percent growth, and HMOs continued their three-year downward trend, declining by 4.2 percent to $1.5 billion (see Exhibit 2, right).

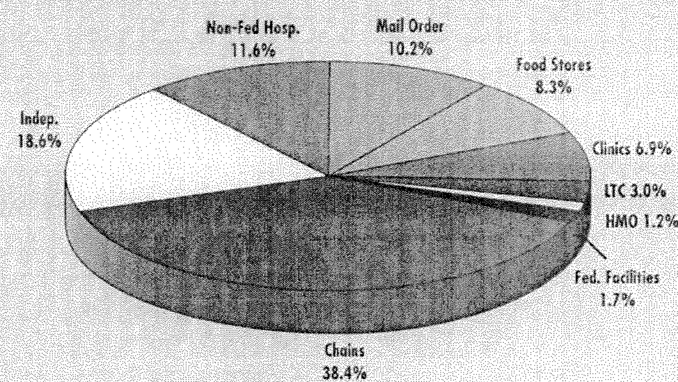
Prescriptions

There were no major shifts in distribution during 1999, although chains and food stores showed slight increases in share at the expense of independents. Chain stores dispensed 1.5 billion prescriptions, for a market share of 52.9 percent. Food stores increased by 51.6 million to reach 357.4 million, earning a 12.7 percent share. Independents, despite stronger growth than in 1998, lost market share, dropping 1.2 points to close the books with 25.6 percent for 723.7 million dispensed pre-

Exhibit 1

1999 Rx PHARMACEUTICAL PURCHASES BY CHANNEL

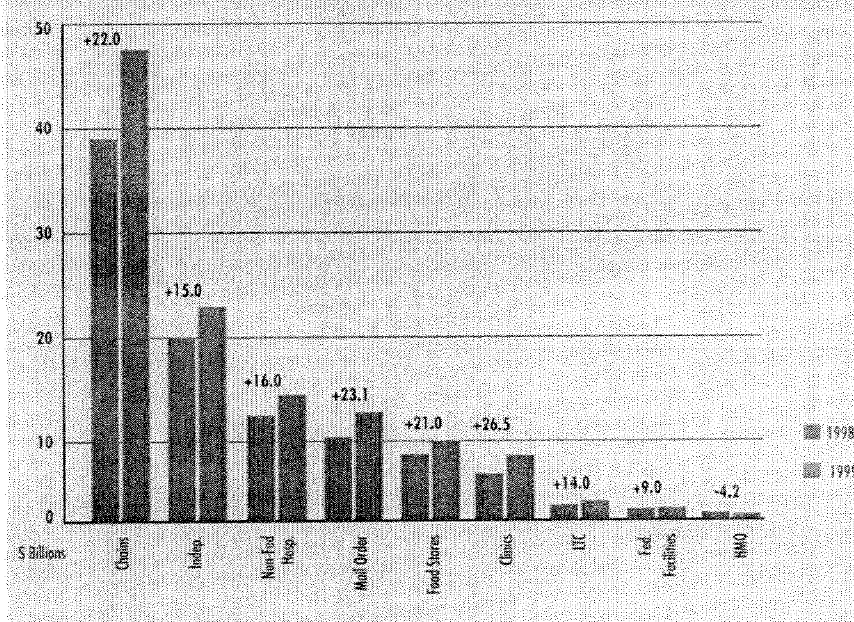
Total Sales = $125.1 Billion



Sources: *Retail Perspective™* and *Provider Perspective™*

Exhibit 2

U.S. PHARMACEUTICAL MARKET — CHANGES IN PURCHASE ACTIVITY



Sources: *Retail Perspective™* and *Provider Perspective™*

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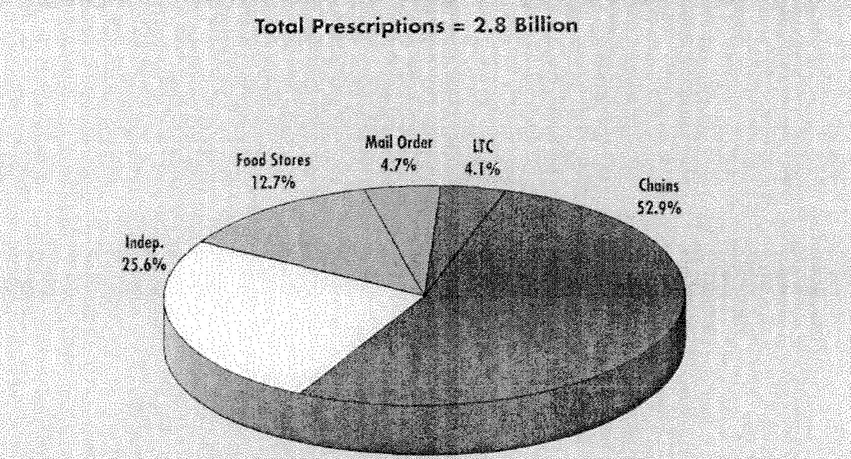
Exhibit 3

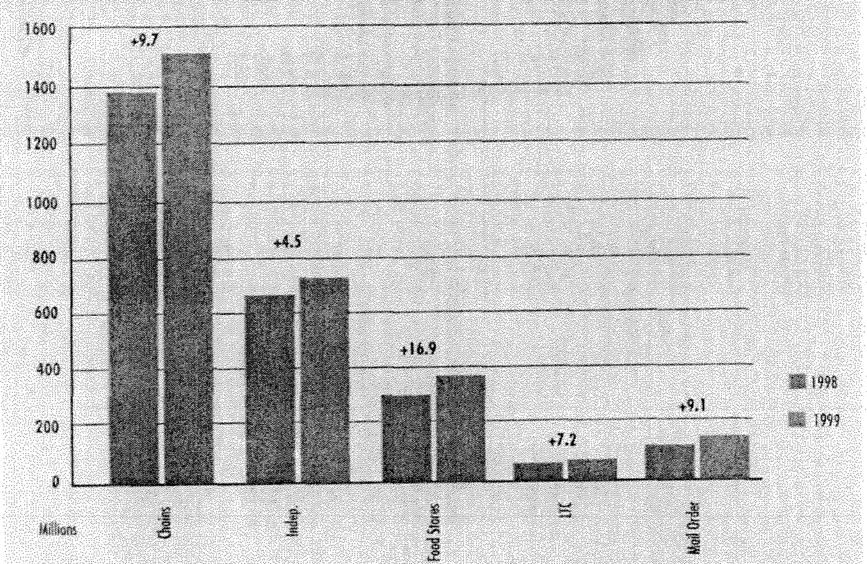
1999 DISPENSED PRESCRIPTIONS BY CHANNEL



Source: NPA Plus™

Exhibit 4

CHANGES IN PRESCRIPTION ACTIVITY



Source: NPA Plus™

scriptions. Long-term care facilities and mail order accounted for the remaining 8.8 percent (see Exhibit 3, above).

Each retail channel recorded a growth rate two to three points higher than in 1998. On the other hand, long-term care grew by seven percent, whereas the 1998 growth was at one percent. Meanwhile, mail order prescription increases slowed slightly from 12 percent in 1998 to nine percent this year (see Exhibit 4, above).

Leading therapeutic classes

Sales

The top-three classes remained firmly entrenched in their leadership positions, while another blasted onto the top-20 chart (see Exhibit 5, p. 44).

- Anti-ulcerants grew by 19 percent to top the $8.5 billion mark. AstraZeneca's Prilosec and TAP's Prevacid, two of the top-five products, lead the class with respective 49 and 28-percent shares. Prilosec grew by 21 percent to $4.2 billion, while Prevacid posted an impressive 67-percent gain to $2.4 billion (see Exhibit 8, p. 48). The older products in the class, Merck's Pepcid, Lilly's Axid, and Glaxo's Zantac have suffered as a result.
- The statin class moved into second place, growing by 24 percent to $7.2 billion, and also boasts three products in 1999's top-20 list. Warner-Lambert's Lipitor took the market by storm in 1997, and has sustained its meteoric rise to own 41.4 percent of the class in 1999, with sales of $3 billion. Both Merck's Zocor and Bristol-Myers Squibb's Pravachol have not only slipped in the overall rankings, but have also dropped more than two points in share of class. Meanwhile, sales of Merck's Mevacor, the 1987 pioneer, and Novartis' Lescol declined sharply for the second straight year.
- Specific neurotransmitter modulators were nudged into third place, after an 18-percent increase to just under $7 billion. Lilly's Prozac, Pfizer's Zoloft, and SmithKline Beecham's Paxil lead the class, and are among the top-10 products. These three products accounted for 90 percent of the market in 1998 and, despite modest growth, their combined share has dipped to 83 percent for 1999. Newer products — Wyeth's Effexor XR and Forest's Celexa — have taken up the slack.

continued on page 44